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04.30500 REAL ESTATE APPRAISER SELECTION PROCESS

04.30501 Contents

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04.30502 Scope


This method establishes the requirements for the appraiser selection process.

04.30503 Purpose

The purpose outlines to use of the Real Estate Appraiser Selection Process to screen for high quality Real Estate appraisal services at a fair and competitive price.

04.30504 References


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| Real Estate Appraisal Policy | 04.301 |
| Real Estate Appraisal Preparation and Review Standards | 04.302 |
| Real Estate Appraisal Procedures | 04.303 |
| Procurement and Contracting | 07.100 |
| Supplier Diversity and Outreach M/WBE Rule | 40E-7, Part VI |

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Performed By: Economic Evaluation Unit

A. Appraiser List:

1. Periodically, the Economic Evaluation Unit will advertise within the District boundaries to solicit for fee appraisers interested in performing District appraisal assignments. Appraisers may apply for the District's approved appraiser list at any time and the ARC will consider their applications. The respondents will be requested to supply the following information:
 - a. Name and address of place of business.
 - b. Individual resume for appraisal staff to include appraisal designations (currently certified), educational background, state certification, and appraisal experience including specialized appraisals for wetlands, agricultural properties and eminent domain proceedings.
 - c. Typical hourly or daily rate charged for principal staff and appraisers.
 - d. Listing of counties and courts where applicant has been accepted as an expert witness.
 - e. A copy of a recent appraisal completed for eminent domain purposes or a suitable substitute. This is not necessary if previously on approved list.
 - f. Minority or women owned business certification from the District.
 - g. Current references from attorneys.
 - h. Primary and secondary appraisal region preference.
2. After the District receives the responses, the Chief Appraiser and staff of the Economic and Evaluation Unit (EEU) will evaluate each applicant according to appraisal region and qualifications.
3. The EEU and the ARC will give consideration to minority appraisal businesses in each region according to District policy.

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4. The ARC will review the appraiser applications and select the qualified appraisers for each region. These appraisers will comprise the appraisers list for the District. The following criteria, not necessarily listed in order of significance, will be used in selecting appraisers for the District list:

Minimum Criteria:

- a. Senior level designation from an appraisal organization that is a member of the Appraisal Foundation.
- b. State certified general appraisal license.
- c. Experience in appraising agricultural lands, wetlands and environmental sensitive properties.
- d. Continuing appraisal education current/complete.
- e. Acceptable performance on past District assignments if applicable.

Other Considerations for Appraiser List:

- a. Qualification as expert witness in eminent domain proceedings.
 - b. Hourly rate charged for appraiser.
 - c. Minority or Women Owned Business status.
5. The appraiser list will be amended by the ARC, when necessary, to make additions or deletions. To assist in this process, the EEU will make recommendations based on the performance of appraisers who have completed assignments for the District.

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Performed By: Chief Appraiser or Designee


B. Appraiser Evaluation System:

1. Appraisals completed for the District are reviewed by the Chief Appraiser, and/or the Senior Review Appraiser, and the Review Appraiser. The appraiser's work performance is then evaluated. The evaluation criteria is set out below. A matrix has been established to weigh the various categories.


Categories:

Definitions:

| | |
|--------------------|---|
| Compliance Review | There are ten headings of the Compliance Review and each is worth one point. Grading is done on the first report submitted. |
| Clarity | This considers if the written report is clear and easily understood. |
| Content | The report most accurately describe the Subject Property's topography, access, potential, etc. and its environment. |
| Presentation | The overall report must be well presented, in a flowing manner. This includes pictures, maps and other references. Few errors in original submission and any revisions. |
| Responsiveness | The appraiser is required to respond to review questions within five (5) days. Consider the overall accessibility and responsiveness of the appraiser. |
| Highest & Best Use | Must be clear and definitive. Does it support the value conclusion (i.e. is cattle ranching the highest and best use @ \$2500/acre?). |

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| Methodology | Description of what approaches were used and how appraisal problem is solved, including how the before and after is completed, and how the grazing reservation, etc. fits into estimate. |
| Adequate Sales | Sufficient number of sales, appropriate type of sales, adequate description of sales. |
| Unit of Value | Development of the unit of value to include any adjustments. Is the price per acres reasonable? |
| Before & After | Well developed analysis, consideration of damages, description of property before and after, highest and best use of both. |
| Final Conclusion | How well is the final number developed and does it represent what has been discussed in the report. Were the math calculations completed in a satisfactory manner? |

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Performed By:


Appraisal Review Committee

C. Appraiser Selection

1. The ARC will select appraisers for appraisal assignments based on competitive proposals. These proposals are for professional services and selection criteria include the following:
 - a. Appraiser evaluation scores. See Exhibit 04.30599.01
 - b. Area experience evaluation. See Exhibit 04.30599.02
 - c. Minority Business Classification.
 - d. Number of current work assignments with the District.
 - e. Late penalties.
 - f. Fee estimate.
2. The Chief Appraiser or designee will prepare a memo compiling this information and present this to the ARC for consideration.

04.30599 Exhibits

- 01 Appraiser Evaluation Scorecard
- 02 Area Experience Form
- 03 Appraisal Report Compliance Review

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04.30599.01

LAN 06-04

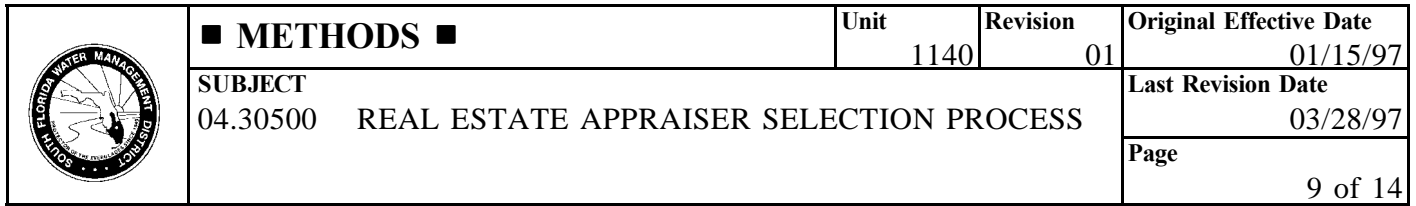
APPRAISER SCORECARD - WITH BEFORE & AFTER

Appraiser _____
 Subject Property _____
 Appraisal Agreement No./ Work Order # _____
 Reviewer _____
 Date _____


REVIEWER S OPINION

| <u>CATEGORIES:</u> | <u>MAX. POINTS:</u> | <u>GRADING (1 - 10)</u> | <u>WEIGHT* (ROUNDED)</u> | <u>WEIGHED GRADE (ROUNDED)</u> |
|--|--------------------------------|------------------------------------|-------------------------------------|---|
| <i>Compliance Review</i> | 10 | | 3% | |
| <i>Clarity</i> | 10 | | 3% | |
| <i>Content</i> | 10 | | 3% | |
| <i>Presentation</i> | 10 | | 7% | |
| <i>Responsiveness</i> | 10 | | 7% | |
| <i>Highest & Best Use</i> | 10 | | 7% | |
| <i>Methodology</i> | 10 | | 6% | |
| <i>Adequate Sales</i> | 10 | | 17% | |
| <i>Unit of Value</i> | 10 | | 17% | |
| <i>Before and After</i> | 10 | | 12% | |
| <i>Final Conclusion</i> | 10 | | 17% | |
| TOTAL POINTS - UNWEIGHTED | 10 | | 100% | |
| <i>Extra Credit: Early Delivery Date</i> | 5 | | | |
| | | | | |
| FINAL WEIGHTED SCORE | | | | |

***BASED ON MAXIMUM WEIGHTED POINTS OF: 89**



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04.30299.02

AREA EXPERIENCE FORM
SFWMD

Appraisals:
3 points each, max. 15 points;
2 points for similar property type;
1 point for same county or close proximity

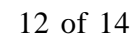
| Name/Location | Date | Size | Type Property |
|---------------|------|------|---------------|
| 1. | | | |
| 2. | | | |
| 3. | | | |
| 4. | | | |
| 5. | | | |


Relate the appraisals to proposed assignment (5 points)

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Briefly, what is your understanding of the scope of this assignment and what is required to complete the appraisal (5 points)

NOTE: Your company’s form with similar data and discussion may be substituted for this form.



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SUBJECT INSPECTION


| | | | | |
|--|--|--|--|--|
| A. Date of Property Inspections | | | | |
| B. Statement Regarding Invitation Made to Owner to Accompany Appraiser | | | | |
| C. Subject Photographs | | | | |

DESCRIPTION OF PROPERTY

| | | | | |
|--|--|--|--|--|
| A. General Area Description & Analysis | | | | |
| B. Neighborhood Description & Analysis | | | | |
| C. Property Description | | | | |
| (1) General Description to Include Present Use | | | | |
| (2) Zoning/Land Use | | | | |
| (3) Assessment and Tax Data | | | | |
| (4) Utilities | | | | |
| (5) Size & Shape | | | | |
| (6) Topography & Soil Conditions | | | | |
| (7) Description of Improvements | | | | |
| (8) Legal Access | | | | |
| (9) Property History & Analysis of Prior Sales | | | | |
| (10) Legal Description | | | | |

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| D. Maps | | | | |
| Appraisal reports for whole takings shall contain a sketch or plat of the property showing: | | | | |
| (1) Boundary Dimensions | | | | |
| (2) Location of Improvements | | | | |
| (3) Other Significant Property Features | | | | |
| (4) District Map - Surveys | | | | |

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| E. Partial Taking Valuation | | | | |
| Description and Sketches of: | | | | |
| (a) Larger Parcel | | | | |
| (b) Part Taken | | | | |
| (c) Remainder to Include Access | | | | |

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HIGHEST & BEST USE

- A. Definition
- B. Analysis and Conclusion:
- (1) As Vacant
 - (2) As Improved (if applicable)
 - (3) Not for Government Use
 - (4) Highest and Best Use of the Remainder

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APPRAISAL PROCESS & DOCUMENTATION

- A. The appraisal shall include all applicable approaches to value. If an approach is not considered applicable, then the appraiser shall state why. All pertinent calculations used in developing the approaches shall be shown.

- (1) Market Approach
 - (a) Sale Write-ups w/Verifications
 - (b) Deeds
 - (c) Sale Photographs
 - (d) Sale Charts w/Adjustments
- (2) No Government Sales
- (3) Sales Not Used (Chart Form)
- (4) Cost Approach
- (5) Income Approach

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- B. Where two or more approaches to value are used, the appraisal shall show the correlation of the separate indications of value derived by each approach as well as a reasonable explanation for the final conclusion of value.

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- C. Exposure time estimated

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CERTIFICATION OF VALUATION

A separate Certificate of Valuation is required for each parcel being appraised. If there is an easement taking and a fee taking from the same parcel, each one must have a separate certification. A copy of the required certification is attached to these guidelines.

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ADDENDA AND EXHIBITS

- A. Location Map - should show location of subject in relation to general area.

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- B. Comparability Map - indicates subject property and location of sales.

- C. Plat plan and/or other pertinent exhibits.

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